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# **Universal Ideals in Local Realities: Online Viewing in South Korea, Brazil and India**

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## **Abstract**

The potential of the internet to act as a global distribution outlet for screen content has long come into conflict with the nationally-focused strategies of producers, broadcasters, governments and internet service providers. Online viewing therefore acts as a useful case study for interrogating how tensions between 'global' and 'local' manifest within an increasingly digitized media landscape. This article examines the online viewing markets in three countries at different stages of digital maturity (South Korea, Brazil, India) to consider how online viewing has evolved in each. It then examines audience questionnaire and interview data generated in each country to explore how viewers are making sense of and valuing online viewing services. By interrogating all three samples before focusing specifically on India in more detail, it examines two tensions within the global expansion of online film and television distribution: between global trends and local infrastructures, and between the ideals of online viewing services and the grounded realities of their daily use.

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Uses of the internet by the screen industries as a distribution platform creates a complex relationship between the infrastructures and services facilitating online dissemination of film and television, and the consumption practices of geographically and temporally dispersed connected viewing audiences. Grasping the factors at play in defining that relationship becomes particularly dense when recognizing how such connected viewing is now emerging as an addition to the channels of transnational media flows. In one respect, connected viewing might be judged to exemplify a boundaryless global mediascape, resisting the constraints of space and time by making content accessible anywhere anytime. At the same time, limitations to broadband coverage and speed, restrictions placed on the provision of content by territorial licensing, the application of geo-blocking strategies, or the diverse socio-economic specificities of media user communities, are just some of the factors at play in ensuring connected viewing is always deeply embedded in specific contextual circumstances. So the promises of constant and ubiquitous access that have so often driven the utopian rhetoric of connected viewing must always be judged against the on-the-ground realities of what is actually available to users and how they actually interact with variable levels of provision. In these ways, connected viewing invites us to reconsider again the global/local dyad, but also what 'global' and 'local' might stand for in the online and connected viewing universe. Asking what means of delivery and access to media content are available to who, and how and why that 'who' make use of that content, might be considered an overarching set of concerns for assessing the ways in which connected viewing is now integrated into contemporary popular media.

The tension between online viewing's boundaryless potential and specifically local realities has, so far, reached its epitome in debates around, and strategies to fight, media piracy but the relationship between 'global' and 'local' in relation to online viewing raises additional questions concerning the expansion of the media industries into online viewing services and the impact this expansion has on viewers' relationship to, and use of, screen content. At the most obvious level, the global/local dynamic is evident in how international markets for online services have very quickly created a commercial landscape populated by services from domestic operators, such as Olleh TV in South Korea, NetMovies in Brazil and BigFlix in India, but which in some cases are now competing against the entry of localized services from US-owned corporations. Netflix, for example, has rapidly expanded across Europe, Latin America, Australia and New Zealand and now labels itself, however hyperbolically, as a 'global Internet TV network' (Netflix, n.d.: online). However, such expansion has had to navigate the specific context of each country, bringing the global media industries into close proximity with local systems, infrastructures and tastes, with Netflix regularly reporting on the comparative speeds of specific countries' internet service providers (Netflix 'ISP Speed Index'). Online viewing functions as a global, multinational strategy and the spaces of online viewing demonstrate a further space to explore how tensions between the global and the local play out.

Scholarship on online distribution, however, has tended to focus on what Stuart Cunningham and Jon Silver describe as the 'US hothouse' (2013: 32; Strover and Moner, 2014), the UK (Evans and McDonald, 2014), or more politically charged countries such as China (Cunningham and Silver, 2013: 43-48). This article seeks to

expand the debate around the impact of online viewing services for film and television content by examining the market conditions and audience attitudes in South Korea, Brazil and India. Whilst India, and to a lesser extent Brazil, has seen some attention (Cunningham and Silver, 2013: 43), primarily in terms of piracy (Sundaram, 201; Karaganis, 2013), a broader examination of online viewing in terms of formal infrastructures and audience attitudes in any of these territories, and especially a comparative analysis, remains underexplored. Individually, they represent very different stages in terms of digital development. The International Telecommunication Union's ICT Development Index for 2013 listed South Korea as the second most developed nation, with Brazil 65<sup>th</sup> and India 129<sup>th</sup> (ITU, 2014: 42). We therefore do not wish to present them as the definitive comparison for considering the transnational expansion of online viewing, and certainly suggest that further research in other markets across the globe would be equally revealing. They do, however, serve as a starting point for evaluating the relationship between national or sub-national infrastructures at distinct stages of digital development and the attitudes and experiences of 'connected' viewers.

In particular we will explore two interrelated tensions: between global trends and local infrastructures, and between 'ideals' of what online viewing services should be and the grounded realities of using such services. The uniqueness of individual nation-markets has seen debate within transnational media studies. Michael Newman, when discussing the impact of peer-to-peer networks on television, argues that, 'P2P circulation of television content challenges the local and national basis of television's traditional institutions replacing old spatial and temporal configurations based in specific political geographies with a new global and cosmopolitan world of media

flows’ (Newman, 2012: 465). Others, however, have presented counter points to this argument. In terms of television, Graeme Turner argues that “television” involves such varying forms, platforms and content in its different national and regional locations that it is increasingly implausible for one set of experiences to be regarded as representative’ (2011: 32). Elizabeth Evans and Paul McDonald take a similar approach to online viewing, arguing that we must, ‘recognize and interrogate profound differences in how digital media is deployed, organized, monetized, used, adopted, understood, and evaluated across local, international or regional contexts’ (2014: 159). These positions present two opposing approaches for interrogating global media. On the one hand, the increasingly global nature of digital media is breaking down national differences, opening up transnational avenues in both industry distribution and audience access. On the other hand, nationally specific contexts present distinct characteristics defined as much by media industries and technology as other socio-cultural factors. The research discussed here indicates a position between these two arguments in the tension between shared ‘universal’ ideals of what online viewing should offer its audiences and how the specific capabilities and limitations of local, nationally or regionally-specific digital infrastructures facilitate or restrict the realisation of that ideal. To explore these tensions, the article initially presents an analysis of how infrastructural conditions and market developments define the parameters for online viewing in these territories. The article then turns to empirical audience research to examine the relationship between infrastructure, ideal values and the lived realities of these services for their users.

### **Connected Viewing Environments: A Formal Market Perspective**

Brazil, India and South Korea serve to effectively illustrate how the global diffusion of online distribution is continually filtered through a multiplicity of specific infrastructural, market and political factors. Differences in network coverage, broadband access and speed, levels of device ownership, corporate strategies, and IT policy or media regulation all contribute towards setting the contextual parameters of online viewing. As these conditions both facilitate and restrict the provision of, and access to, VOD services, so they variously mark distinctions between national markets. When taking into account the range of factors just identified, South Korea, Brazil and India are currently at different levels of digital maturity. Near total broadband penetration has positioned South Korea amongst the foremost connected nations of the world. Meanwhile penetration in Brazil and to an even greater extent India is deeply uneven. When considering how connected viewing is situated in the latter two cases, to presume any homogenous national context would be to ignore how sub-national divisions ensure connected viewing in Brazil and India still remains a predominantly urban and class-bound experience. Consequently, the limited scope and size of the connected viewing audiences in those territories is reflected in the composition of the Brazilian and Indian samples for the audience research discussed below. Variations in the maturity or development of the connected viewing environments in these territories cannot therefore simply be read in terms of national differences; while the level of connected coverage might mean it is more plausible to draw broad-based conclusions about South Korea as a networked nation, internal technological, geographic and demographic factors create a more divided picture for Brazil and India.

South Korea has long been recognized as having one of the most developed ICT infrastructures in the world in terms of coverage and speeds. Following the introduction of broadband services in 1998, the country had the highest broadband penetration in the world by the year 2000 (Ovum Consulting, 2009: 4). By 2014, 98% of Korean households were connected (the highest proportion worldwide), while penetration of fixed and wireless-broadband reached 38% and 105% respectively.<sup>i</sup> In 2002, Korea became the first country to commercially offer 3G mobile internet services, and one year after 4G LTE was introduced in 2011 full nationwide coverage had been achieved. Policy-makers and telcos have since redirected their focus from provision of access towards improvements in quality and speed (ITU, 2014: 47). In 2004, the government initiated the Broadband Convergence Network project to create a high-speed infrastructure enabling media convergence, ubiquitous connectivity or access, and coordination among network stakeholders (Menon, 2011: 19-20). In January 2009 the Ultra-Broadband Convergence Network was announced, which aimed to increase speeds to 1Gb/s for fixed-line subscribers and ‘to establish an information and communications environment in which anybody can use converged network services anytime and anywhere with convenience’ (Lee, 2010: 324). KT, the country’s second-largest mobile carrier, committed itself to fulfilling this goal when launching its ‘GiGAtopia’ initiative in May 2014, delivering Gigabyte speeds to end users to facilitate ultra-high definition (UHD) television, 3D digital signage and the ‘Internet of Things’ (Kwon and Evans, 2015; Jung-yoon, 2014; Young-won, 2014).

While South Korea represents a model of the established connected society, Brazil might be regarded as still at an emergent stage. In 2010, the Brazilian government began the Programa Nacional de Banda Larga (PNBL), a four-year initiative to



promote digital inclusion and reduce social and regional disparities by creating a fast and affordable broadband infrastructure reaching the country's less-populated municipalities (GSMA, 2012: 36). While the vision was to create a wired society, the main change over the period has been the boom in mobile connectivity. Whereas PNBL's plans prediction of 30 million wired broadband connections by 2014 resulted in only 23.2 million, mobile connections reached 127.2 million, massively exceeding the 60 million forecast (Teixeira, 2014). Mobile connectivity now defines Brazil's internet landscape: the country has the largest number of 3G and 4G subscribers in Latin America and has emerged as the world's fifth-largest smartphone market after China, the US, India and Indonesia (GSMA, 2014: 14, 17). Internet policy in Brazil reached a landmark in April 2014 with presidential approval of the Marco Civil da Internet, a framework of civil rights for a free and open Internet (Presidência da República Casa Civil Subchefia para Assuntos Jurídicos, 2014). This law promotes 'access to the internet [as] essential to the exercise of citizenship' (4) and installs a number of provisions including freedoms of expression and rights of access to the Internet and information.

Characterized by a mass but restricted internet population, India occupies a paradoxical position in the global online community. Figures for the end of 2014 from the Telecom Regulatory Authority of India (TRAI) placed the country's total internet subscriber base at 267.39 million, with 175.21 million in urban areas against 92.18 million in rural locations (TRAI, 2015: ii). Forecasts from the Internet and Mobile Association of India and IMRB International sized the population even higher, with India poised to leapfrog the US to become the world's second largest national online population with over 300 million users (Press Trust of India, 2014). While enormous,

the scale of the user base must be put into perspective: even at 300 million users, this still represents less than 24% of the estimated 1,267 million population. Geographical limits to accessing the physical infrastructure, the cost of data programmes, and a deficit in local language content, have all impeded expansion of the online population. Broadband connectivity has been driven by the mobile market: according to TRAI, at the end of 2014, of 85.74 million broadband subscribers, mobile wireless (phone or dongle) accounted for the overwhelming majority (81%), compared to fixed wireless (0.5%) and wired (18%) (TRAI, 2015: 29). In the mobile market, feature phones, which offer only basic communication functions and internet browsing, have captured the biggest share of sales. Their limited functionality, small screens and lack of touch screen technology mean they have limited potential as connected viewing devices and are relatively rare in more developed mobile markets that favour the more expensive smartphone. In India, however, feature phones accounted for 70% of the 258 million devices shipped in 2014. Even those with smartphones do not easily equate to high-speed service subscriptions, however: although there were over 130 million devices with 3G capability in India, and 5.5 million to 6 million 4G devices, only 69.9 million 3G subscribers and about 85,000 active 4G subscribers were active (Nokia, 2015: 7).

Infrastructural conditions and device ownership set the parameters for the internet-based VOD markets of Brazil, India and South Korea. Here we will focus on legal services rather more informal and non-nation specific illegal networks. This is to allow a more direct examination of how regulatory and industry policy shapes the ways in which online viewing is presented to each market's audience. One of the key factors differentiating these territories is how legal VOD markets have been steered by either IPTV (Internet Protocol TV) or 'Over-the-Top' (OTT) services. Although

both use the internet to deliver content, there are key differences between IPTV and OTT VOD services. IPTV, common in South Korea, involves subscription film and television services delivered by a telecommunications or internet service provider, exclusively over that provider's own managed network. OTT (or 'internet television') services, common in Brazil and India, instead deliver content to any connected device using the unmanaged, public internet without any dedicated network or infrastructure provider (Wingard, 2014). While this makes OTT services more openly accessible via multiple access points, IPTV service providers have moved to compete against the flexible mobility of OTT offerings by introducing 'TV Everywhere' options, which use systems for authenticating user subscriptions to give access to services across multiple platforms. Tied to the managed infrastructures of telcos and ISPs, the IPTV business tends towards oligopolistic structures, with the dominance of a few providers presenting barriers to market entry. This has been the case in Korea, where IPTV offerings from telcos KT (Olleh TV) and LG U+ (LG U+tv), and the ISP SK Broadband (B TV), dominate.

Regardless of these differences, the flexibility and mobility of online consumption is presented as the future of viewing, with OTT services bypassing traditional channels of delivery. Online VOD in whatever form is eagerly and urgently viewed as offering the space for market growth. This has been particularly visible with the expansion of OTT services in Brazil and India, where multiple categories of provider have rushed into this space. Service providers range across local television broadcasters, cable or satellite pay-TV operators, telecommunications companies, film distributors, and media and entertainment companies. Subscription (SVOD), pay-per-view (PPV) or transactional (TVOD) and free (FVOD) or advertising-supported (AVOD) models all

operate to variously offer ‘catch-up’ television, streaming, rental or electronic sell-through purchases. Consequently, although still in their emergent stages, in a very short period these markets have rapidly become complex and cluttered.

With the major IPTV players continuing to define online VOD in Korea, OTT VOD has yet to take off, although the anticipated arrival of Netflix in 2016 may change the landscape (Jin-young, 2015). Yet, as might be expected for a country with such an advanced IT infrastructure, Korea has seen innovations in online distribution. During 2012 and 2013 Hollywood majors Disney and Sony experimented with offering online feature films shortly after they opened in cinemas and were still continuing their theatrical runs. *Brave* (2012), *Wreck-It-Ralph* (2012) and *Django Unchained* (2012) were made available as ‘super-premium VOD’ offerings priced at around \$9 each compared to the usual \$3.50 for cable or online rentals. Potentially threatening the primacy of theatrical exhibition in the established system of staggered release windows, justifications for conducting the experiment in South Korea pointed to fast internet speeds and decimation of the DVD market by online piracy (Fritz and Kwaak, 2013). In 2014 Warner Brothers Korea introduced a special service on KT Olleh TV and LG U+tv for streaming films not released by the company in local cinemas (Hyo-won, 2014), further centralising the internet as distribution channel. Speaking at the 2014 Busan International Film Festival, Joon S. Im, from Seoul-based conglomerate CJ E&M, offered a sign of how online distribution is changing thinking in the domestic film industry when he said ‘We’ve stopped calling it the ancillary market and are calling it the digital distribution market. This comes from the thinking that theatrical distribution and digital distribution should be discussed on the same level’ (quoted in Noh, 2014).

Although some online distribution services were already operating, such as that from local DVD mail order rental firm NetMovies, 2011 was the year Brazil's VOD market took off. In September, Netflix established an SVOD service, its first outside North America, and two months later Apple introduced iTunes as a transactional service (Cajuerio, 2012; Hopwell, 2012; NexTV, 2013). The following year, Google Play and the Japanese anime service Crunchyroll arrived, while Sony Picture Television's Crackle network established a free AVOD service (de la Fuente, 2012; Teixeira, 2015). Arrival of the global brands catalysed the domestic pay-TV industry, spurring leading cable operator NET and satellite operator Sky to defensively launch their Now and Sky Online services (Cajueiro, 2012 and 2013). With an estimated subscriber base nearing 2 million paying R\$17.90 per month (approx. £3.50/\$5.50) Netflix has emerged as the market leader, offering a diverse array of imports and a large quantity of locally-produced film and television content (see [bra.istreamguide.com](http://bra.istreamguide.com)). While growth in pay-TV subscriptions has slowed with the arrival of OTT services, as yet Brazil has not seen the 'cord cutting' witnessed in the US and elsewhere as cable customers cancel their subscriptions (Teixeira, 2015). One regulatory factor that may potentially constrain future growth in Brazil is the so-called 'VOD tax'. The Brazilian government already levies contributions from the production, distribution and marketing of films and videos, which are reinvested into the national film industry (KPMG, 2012: 65-66). In response to protests from pay-TV operators that VOD providers were exempt from this tax, the government announced an expansion to the levy's remit and since 2013 VOD operators are required to register the titles they distribute online. With contributions of around R\$3,000 for each feature film and R\$750 for each television episode, this will have a serious

financial impact for services dependent on making thousands of titles available at any time (Cajuerio, 2013; Mango, 2013; Solot, 2013). Acknowledging that the tax may potentially impede growth of the VOD market, the government is currently engaging industry stakeholders in discussions over possible changes to the system (IIPA, 2015 p. 79).

Now a leading player in India's VOD market, BigFlix from Mumbai-based media and entertainment company Reliance started in 2008 as the country's first film-on-demand service (Gaikwad, n.d.). While BigFlix offers an SVOD service, other leading names operate hybrid business models with AVOD and SVOD options, including BoxTV from local media conglomerate Times Group, and film producer-distributor Eros International's service ErosNow. Already a leading force in the Indian pay-TV market, Zee Entertainment branched out into SVOD with Ditto TV. Launched in 2012, Singapore-based Spuul (AVOD, SVOD and TVOD) reaches out to the South-Asian diaspora by making Indian-produced content available worldwide, although the majority of users are located in India followed by the US. With most users watching on mobile devices but confronting the obstacles of slow mobile networks and large data bills, from October 2013 Spuul began offering the option for downloading to watch offline using the Offline Sync function (Chng, 2013; Roettgers, 2013). Addressing linguistically diverse communities, in most cases India's VOD platforms are carrying content in English, Hindi and multiple regional languages.

Reflecting on these three contexts, there are several shared trends: how adoption of mobile connectivity is outstripping growth in fixed wired or wireless broadband, the rapid emergence of complex VOD markets, and the efforts of incumbent pay-TV

operators to compete with the existing or imminent threat presented by OTT services. At the same time, between the three cases, uneven levels of network coverage, access or speed, combined with differences in device ownership and market structure or regulatory conditions, all ‘help to illustrate the challenges of making universal claims about the future of digital delivery’ (Tryon, 2013: 46). As suggested earlier identifying how connected or online viewing is now integrated into the global mediasphere means not only avoiding the making of universal claims *between* nations but also *within* nations. Unevenness in the ‘maturity’ of connected viewing environments means looking beyond broad national infrastructural conditions. It may be true of all media formations that the interaction between the global and the local is only ever found in the complex particularities of how exchanges are enacted between the supply and the use of media content. The foregoing has defined connected viewing environments by outlining the general contextual factors of network coverage, device ownership, and service provision, but these market profiles have an abstract, partial relationship to human agency and say little about the grounded realities of how individuals actually make use of their services. It is therefore necessary to turn to the users of such services to examine how tensions between the global or national and the immediately local are enacted in actual consumption attitudes and practices, and how this dynamic highlights points of divergence between the ideals associated with online viewing services and the lived realities of their use.

### **Researching Transnational Online Audiences**

In order to explore the lived realities of online viewing in these three markets we conducted audience research in each country via interviews and questionnaires with audiences familiar with connected viewing services. The resulting datasets again

demonstrated a mix of global trends and local specifics, pointing to neither a simplistic sense of universal behavioural and attitudinal patterns nor a pattern of unique market characteristics. On the one hand there is an overlapping of shared beliefs about what online services should offer, whilst on the other there are specific national and sub-national contexts that limit the realisation of such ideal services within our samples' daily lives. This not only indicates tensions between the global and the local within online viewing markets, but also tensions between what our sample see as the potential for online services and the realities of actually using current services, realities that are shaped by the specific infrastructural context in which they live. We shall explore some of the ways in which these tensions manifest through issues of access in each country, before focusing on India to explore the specific relationship between online viewing infrastructure and use. As discussed above, India is the least developed market from our three case studies, with regionally or locally specific physical, geographical, economic and linguistic limitations offering a particularly complex set of restrictions around access to online film and television services. As such it offers the most extreme example from our three case studies to interrogate how shared ideals around online viewing services meet the realities of daily use in greater detail.

### *Methodology and Sample*

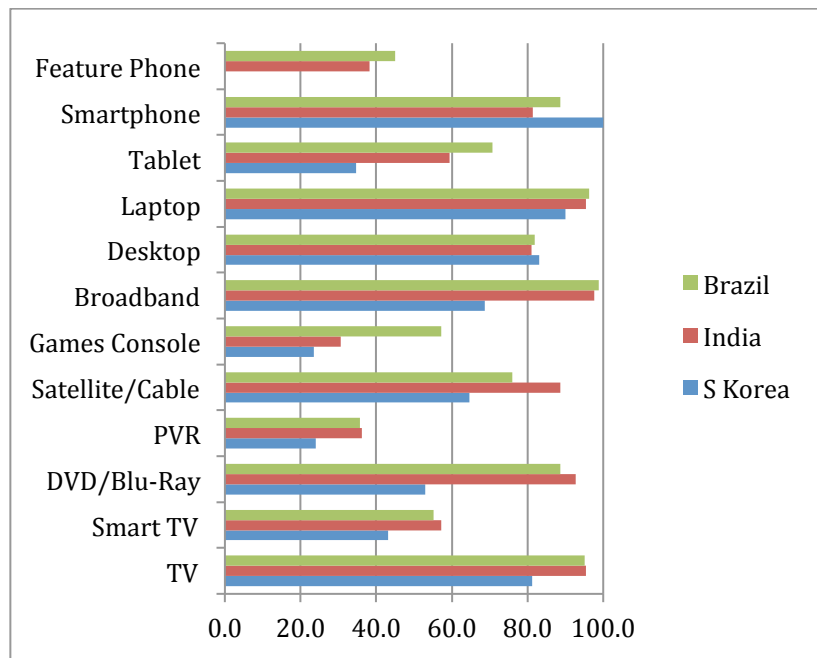
Identical questionnaires, edited only for translation purposes, were distributed in each country and gathered data around the socio-economic context of each sample, media ownership, and the values assigned to both online viewing in general and each country's specific services. We received a total of 182 responses across the three countries (South Korea: 54; Brazil: 81 from Brazil; India: 47). The questionnaire was



bookended by interviews with a sample of five participants in each country. The first round of interviews provided initial ‘scoping’ data to help design the questionnaire. The final round of interviews functioned to generate a more nuanced understanding of the questionnaire findings and participants’ experiences of online viewing. Both the questionnaire and interview sample were recruited via snowballing methods through the research team’s local contacts and explicitly invited participation from those with experience or interest in connected viewing services. This focus naturally excludes those from areas of each country with less developed internet infrastructures, and privileged those in the middle classes. However, it equally aligns the sample with those populations able to access such services and, in particular, the urban focus of the Brazilian and Indian markets discussed above. Each market’s sample consisted of predominantly middle to high-income earners, who lived in urban areas (88%) and were aged under 39 years (85%). Gender was relatively evenly split, though with a slight skew towards female participants (56%) rather than male (44%). The samples differed most significantly from broader populations through their high levels of media ownership with the majority having some form of internet access and owning a laptop or smartphone (see Figure 1. Ownership of connected media devices indicating minimal effects of the initial barriers to connected viewing epitomised in ideas of the digital divide. Whilst not necessarily representative of the broader population in each country, they did fit within groups most able to take advantage of the services discussed above. The below findings subsequently emerge out of choices and preferences that whilst not devoid from issues of economic wealth, something we shall return to, are not purely defined by them.

In interrogating the sample’s media ownership more deeply, some nuance does

emerge between each territory, which reflected the comparative status of each country's digital infrastructure. The South Korean sample showed lower levels of broadband ownership (68.6%) compared to the Brazilian (98.7%) and Indian groups (97.7%, see fig. 1) reinforcing the shift away from fixed internet services and towards mobile services seen in the above market analysis. This was further reflected in the dominance of the smartphone in the South Korean sample, with 100% of participants owning one (Brazil: 88.6%; India: 81.4%). In contrast, the more basic feature phone was absent from the South Korean sample, but still maintained a significant presence in the Brazilian (44.9%) and Indian (38.2%) samples. Similarly, differences emerged in the ownership of film and television technologies. The South Korean sample displayed lower ownership of 'fixed' screen devices such as televisions (South Korea: 81.1%; Brazil: 95%; India: 95.3%), DVD/Blu-Players (South Korea: 52.9%; Brazil: 88.6%; India: 92.7%), PVRs (South Korea: 24%; Brazil: 35.6%; India: 36.1%) and satellite/cable subscriptions (South Korea: 64.7%; Brazil: 75.9%; India 88.6%). Our sample's media ownership, though broadly high, does reflect the different maturity levels of each territory, with the South Korean sample in particular indicating that market's more established investment and transition away from a fixed infrastructure towards mobile technologies.



**Figure 1. Ownership of connected media devices**

The data gathered from each country was therefore from a relatively small, focused sample. Brazil and India, in particular, are countries with significant geographic and economic diversity, between urban and rural and between socio-economic classes. As discussed, our sample primarily consisted of urban and middle class participants, representing a specific sub-section of each country's broader population. However, the value of this data is twofold. As already discussed, it offers initial insight into online viewing markets that represent very different stages of development, but have yet to see concerted academic attention. Secondly, asking each sample the same questions allows for a direct comparison between audience ownership, habits and attitudes towards the same set of issues around online viewing. This provides the opportunity to explicitly interrogate the relationship between market maturity, audience behaviour and value. Whilst we do not wish to claim the findings discussed below as representative, the ability to look between and across three very different online viewing markets allows for initial conclusions to be reached that can

subsequently reveal avenues for further research in film, television and new media studies.

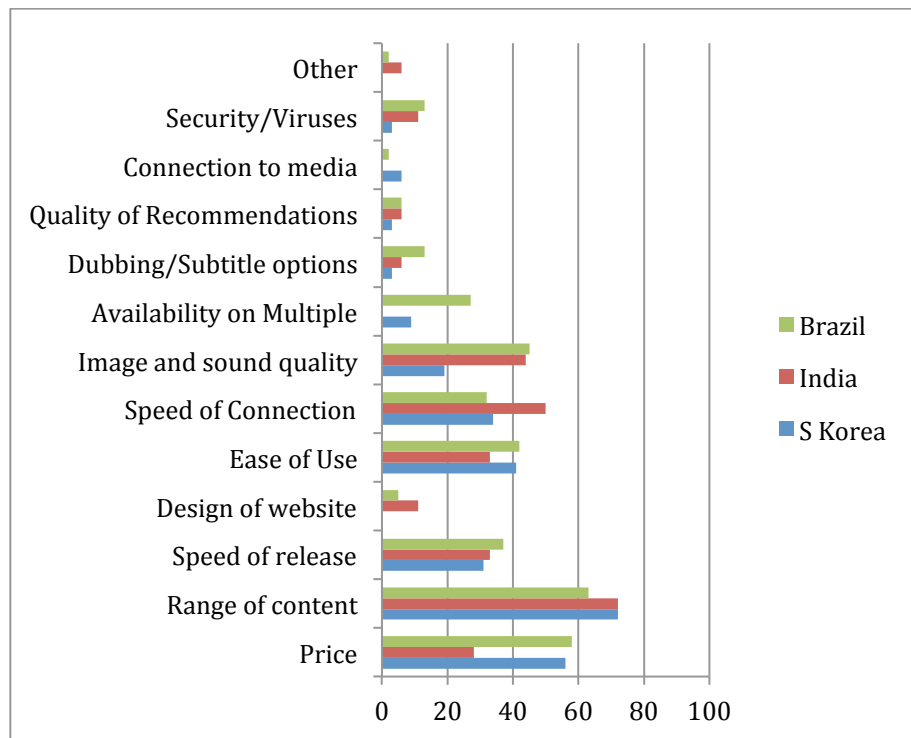
In particular, the data revealed how a sense of ‘universal ideals’ emerged across all three samples, suggesting that despite having different choices in how, where and when to access screen content, there are more fundamental attitudes, desires, preferences and associations tied to online viewing services that exist above and between national boundaries. Our sample demonstrated a shared sense of what online viewing services *should* offer. The ability to actually experience such an ideal service, however, relied on local infrastructures and barriers to this ideal emerged via the daily realities of actually *using* such services. This presents the need for a complex, nuanced framework for understanding how online film and television services expand across the globe. We shall now turn to explore how one specific set of values, coalescing around issues of access, emerged through the research data both in what was shared across each sample, and how the specific context of India shaped the way these ideals are realised (or not) within daily life.

### **Sharing Ideals: Access, Range and Price**

Perhaps the most universal finding to emerge from our research related to the perception of online viewing’s ‘value’, in particular its value for money. For respondents across all three territories, online viewing was valued for opening up access to as wide, and varied, a range of content as possible. The importance of choice has become a central discourse in research around digital culture. As James Bennett has argued, ‘instead of flow, here we have an interface, hyperlinks, and a database structure experienced via broadband rather than broadcasting’ (2011: 2; see

also Lotz, 2007; Nelson, 2014). A greater array of choice at the hands of audiences, rather than dictated by the media industries, sits as a foundation for understanding the changes emerging as a result of digital technologies. The transnational comparative sample within this project opens up the potential to explore how questions around choice and access manifest within markets with very different options available to their audiences.

The importance of choice appeared most directly in the criteria that questionnaire respondents identified as central to how they evaluate online viewing services (see Figure 2. Criteria used to rate online). ‘Range of content’ was the most important criteria in all three samples (South Korea: 72%; Brazil: 72%; India: 63%), a fact that was reinforced in interviews. One participant commented on her preference for YouTube by explaining ‘YouTube has a variety of things to offer. I can find whatever shows I like on YouTube’ (34 year-old female; India). Another criticised the range of content available via Netflix in Brazil as ‘too limited’ (37 year-old male, Brazil). A participant in South Korea, meanwhile, linked a wide range of content to both being able to find what she wanted to watch, but also discover new content: ‘I believe if [a service] has a number of titles, it may be easy to find what I would like to watch and I can also access new titles which I didn’t know before’ (35 year-old, female; South Korea). These discussions spoke to a range of different viewing experiences and values, from an individual being able to easily find exactly what they want to enhancing serendipitous content discovery, but across all three samples, online viewing was idealised as an access point to a wide range of content and increased viewer choice.



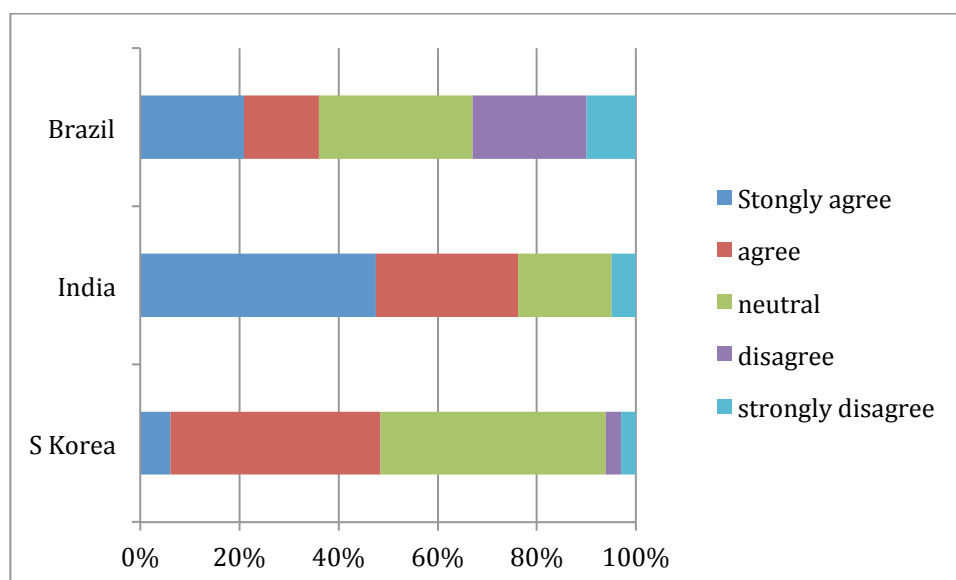
**Figure 2. Criteria used to rate online services**

This desire for unlimited access to content can come into conflict with the differing maturity levels in each sample's territory, with more 'immature' markets limiting official options for audiences. Ramon Lobato positions such a conflict as fertile ground for pirate networks: 'For billions of people around the world, piracy is an access route to media that is not otherwise available. This kind of piracy is not usually a self-consciously political act but a banal, quotidian activity practiced in a context where legal alternatives do not exist' (Lobato, 2012: 82; see also McDonald, 2007; Sundaram, 2010: 106; Lobato and Thomas, 2012; Pertierra, 2012). The desire of audiences for access to as wide a range of content as possible implies a potential openness to unofficial distribution avenues that already offer them access to vast amounts of content, rather than waiting for formal industry distribution to catch up.

Our sample, however, indicates that market maturity (or immaturity) does not

automatically lead to an embracing of unofficial or illegal methods for accessing content. As Figure 3. Do you agree or disagree that accessing film or television content through illegal sources is wrong?) indicates, the Indian sample, the market with the most limited access to official online content, were the most assertive about the immorality of illegal downloading, with 77% agreeing or strongly agreeing that it is wrong. In comparison, the South Korean (48%) and Brazilian samples (36%) were less adamant that online viewing should only be from legal sources, despite both markets having multiple legal options. Across all three samples, the debate around the potential limits of online access to film and television was framed as an ideological one concerning audience rights and the economic value of content. Many who disagreed with piracy simply wrote ‘copyright’ as a way to explain their attitude, or likened it to ‘theft’. A participant in the Indian questionnaire questioned the rights of audiences to access content in ways that do not compensate the industry: ‘someone works hard [to make a film or TV programme] and they get to be paid’ (questionnaire; India). Those who agreed with piracy equally framed it as an ideological issue, but promoted the rights of audiences to access content free and easily. ‘Price’ was the second key criteria used to evaluate services in both the South Korean (56%) and Brazilian (58%) samples. The importance of price was tied to beliefs in audiences’ right to access content. One respondent commented that ‘the content is priced higher than the value of the content’ (questionnaire South Korea). Another commented that ‘everything in Brazil is too expensive, much higher than the general population are able to pay’ (questionnaire; Brazil). In fact a number of Brazilian respondents discussed being in ‘favour of freedom of circulation’ or that ‘in the times of the internet, all information should flow freely’ (questionnaire; Brazil), echoing the rhetoric of the Marco Civil da Internet, which enshrined ideals of access

to information as a basic civil right and again framing access to online film and television content as an ideological ideal.



**Figure 3. Do you agree or disagree that accessing film or television content through illegal sources is wrong?**

The data and comments from our research samples indicate a set of priorities and ideals when it comes to online viewing services that are shared across different markets with different levels of online viewing available. Not only do our samples value services with wider ranges of content more highly, they also connect these services to ideological debates around the audience's rights to access such content at low or no cost, even if their resulting opinions regarding piracy may differ. As one particular quote from the Brazilian sample indicates, this ties to the specifically *online* nature of connected viewing services: 'in the times of the internet, all information should flow freely' (questionnaire; Brazil), echoing the foundational ideal of the world wide web first put forward by Tim Berners-Lee and that has subsequently be re-emphasised through more recent public debates around net neutrality (Kiss, 2014:



online; Cheng et. al., 2008) and open source (Muffatto, 2006). The image of the internet as a vast database of open access information, however removed from reality that image may be, underlines the way all three of our samples approached newer online services. Such an ideal can be identified as a core, universal framework around online viewing practices. A closer examination of the Indian sample, however, reveals that despite there seemingly being a set of universal ideals around what online viewing services should be able to offer audiences, these ideals are filtered through the specific technological infrastructure than enables or limits the use of such services within the routines of daily life.

### **Navigating the Local Infrastructure: A Case Study of India**

The Indian market's comparative 'immaturity', and the barriers to access that immaturity can generate, makes it a useful focus for interrogating how our sample's ideal values for online viewing services manifested within the realities of their daily lives. In particular, our sample revealed the ways in which audiences weigh up the advantages and disadvantages of a number of technology, content and economy based factors in their use of online viewing services. This weighing up may fall in line with the more universal ideals for online viewing that privilege easy and cheap access, but is facilitated or limited by the specific infrastructure an individual is living in.

Michael Strangelove argues that 'the internet turns fee into free' (2015: 10). Such a statement may reflect the ideals of online viewing discussed above, but does not reflect the realities of audiences navigating often complex, and costly, internet infrastructures. Whilst various structures of both legal and illegal online viewing may make the content itself 'free', it is essential to consider the other costs, economic and otherwise, that underpin an individual's ability to access them.

The Indian market had recently seen high levels of government investment in its digital infrastructure when our research was conducted in early 2014 (FICCI, 2013). Despite such investment, however, research respondents saw poor and inconsistent internet speeds as a significant barrier to their ability to use online viewing services, and so take advantage of the wider range of access and choice they imagined could be on offer. Unlike the Brazilian and South Korean samples, the second most popular criteria for rating online viewing services in the Indian sample was ‘speed of connection’ (50%), closely followed by ‘image and sound quality’ (44%). Both of these criteria speak to the importance of stable, well-established infrastructures to underpin online viewing. The impact of India’s less developed internet infrastructure was further apparent in the follow up interviews. Every interviewee raised issues of connectivity in terms of both speed and reliability, firmly placing issues of infrastructure at the heart of the Indian sample’s attitudes towards online viewing. As one participant commented, ‘In India, connection speed...is a problem’ (29 year-old, female). In contrast, older technologies with more established and reliable infrastructures, such as television, were particularly praised in the questionnaire as being ‘convenient’ and ‘easy’. Whereas broadcasting could provide guaranteed content of a high enough quality, online viewing services could not.

The realities of India’s internet infrastructure led to the need for our respondents to manage their online viewing experiences in sometimes complex and even conflicting ways. Questionnaire respondents displayed contradictory preferences in terms of the two dominant mechanisms for online viewing, streaming and downloading. These preferences directly related to a balancing between the unreliability of the internet

infrastructure, the type of content being accessed and the effort required to access it. Questionnaire respondents preferred to download long-form film content (61.1% compared to 38.8% for streaming), but switched preference when it came to shorter content, with 78.6% preferring to stream television compared to 21.4% for downloading.

An explanation for this difference emerged in the interviews conducted after the questionnaire. For some participants, downloading content offered a way to counteract the unreliability of India's internet infrastructure. The following participant, for instance, gave a detailed account of why she downloads, even though she would ideally prefer to use a streaming service:

I download them more because I have an internet connection which is unlimited but not superfast. So, I do watch YouTube on it, but the buffering time is a pain. So, YouTube I'll still watch, but entire seasons of programmes and things.... Normally, I don't like downloading and storing on my computer, I prefer streaming. (29 year-old, female)

Elsewhere in the interview she firmly positioned being forced to use downloading rather than her preferred streaming as a result of underlying problems with her internet connection:

When it comes to Indian internet, because it's relatively slower... even my friends who have high-speed internet and who stream shows online, they have 10GB of data and 4G speeds. After the 10GB is over, the speed is cut down to 2G, then the bandwidth is too slow to support streaming... the second you go outside Calcutta, which I do sometimes for work and stuff, Tata Photon becomes like a dial-up internet connection. (29 year-old, female)

This participant raises a further complexity for the daily realities of our sample's online viewing in the differences in infrastructure between urban and rural areas. For this participant, her ability to have an ideal online viewing experience is limited by frustrations with what she perceives as India's under-developed internet infrastructure. However, this development cannot simply be understood at a 'national' level. Sub-national, regional and sub-regional differences were significant in shaping when, how and where she can use online viewing services and she was required to pay attention to these sub-national differences, be aware of their implications and factor them into any choices she made about accessing online content.

In contrast, other participants raised the economic framework of the internet in India and in doing so pointed to the potential value of using streaming services despite their unreliability. The following participant explained how the expense of downloading, added to the additional time needed to download content, made it financially difficult for her to take advantage of a potentially more reliable viewing method:

'downloading takes time, firstly. Then, it is not affordable. Sometimes, it is quite expensive, I feel. If we download data, we have to pay for it. Then it becomes expensive. So it's better if I stream them' (34 year-old, female). For this participant, economic factors in the form of datacaps outweighed the potentially greater reliability of downloading. The economic framework, in addition to the national and sub-national technological infrastructure, of the Indian market required participants to balance a variety of factors in order to determine which mechanism was the most appropriate for the kind of experience they wanted, or could afford. The specificity of these responses to the Indian sample does not refute any underlying similarity between this sample and those from Brazil and South Korea. The underlying desire

here, for a service with a wide selection of content that is easily and cheaply accessible, is familiar from those other samples. The Indian sample's ability to realise the global and universal ideal of online viewing, however, was restricted by the specific, local limitations of India's national and regional internet infrastructure.

## **Conclusion**

Comparing three markets (South Korea, Brazil and India) at different stages of maturity demonstrates two key tensions. The first is between the global reach of online viewing services and specific national, sub-national and local contexts. The second is between the ideal potential of such services and the grounded realities of using them on a daily basis. Each market shared certain characteristics, most notably the growth of mobile internet services and devices and the threat posed to established distributors by new OTT services. However, sub-national divisions in the infrastructures of Brazil and especially India currently constrain expansion of those markets. These tensions between globally shared ideals and the limited realities of specific market contexts are replicated when considering audiences. All three of our audience samples positioning such connected viewing services within a common set of values based on access and choice where ideological constructs are balanced against or alongside market economics. A further interrogation of the Indian sample demonstrates the way in which that 'universal' desire for choice is shaped by the capabilities and limitations of specific national or sub-national infrastructures. For our Indian sample, despite being predominantly urban and so best positioned for connected viewing, limited bandwidth and the high costs of internet access were sources of constant frustration. They demonstrated a clear sense of what their ideal service quality would be, but also that it remained tantalisingly out of reach.

Here we have demonstrated how these tensions between the global and local, ideal and grounded dimensions of connected or online viewing manifest through one specific aspect, the ways in which access and choice offer an ideal image of online viewing that may be restricted by underlying technological infrastructures. Others areas, however, may equally point to similarly complex approaches. A consequence of wider choice, for instance, is the management of work that audiences must put in to discover new content. Do similar processes of choice management emerge across different market territories? Are they instead a result of specific cultural and technological factors? How are notions of ‘quality’ of service shared or unique across different national contexts? These are questions that should be framed without privileging or denying the unique characteristics that define individual national or sub-national market conditions. The emergence of online viewing across the globe must be considered both in terms of shared, universal ideals for the kind of experience such services can offer, and an understanding of how the daily realities of market infrastructures shape how audiences are able to realise those ideals.

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<sup>i</sup> Penetration levels can exceed 100 percent when the number of subscriptions exceeds the national population, as individuals or households taking out multiple subscriptions. This leaves the possibility that not all members of the population are subscribers.